



Indiana Pro Bono Commission  
One Indiana Square, Suite 530  
Indianapolis, IN 46204

Indiana Bar Foundation  
230 East Ohio Street, Suite 200  
Indianapolis, IN 46204

## COMBINED 2004 DISTRICT REPORT, 2006 PRO BONO GRANT APPLICATION, AND 2006 PLAN

### Pro Bono District 11

**Applicant:** Bartholomew Area Legal Aid, Inc. by Tammara Jo Sparks, Executive Director and District 11 Plan Administrator

**Mailing Address:** 1531 13<sup>th</sup> Street, Suite G330

**City:** Columbus, IN      **Zip:** 47201

**Phone:** (812) 372-8933      **Fax:** (812) 372-3948

**E-mail address:** [bala@iquest.net](mailto:bala@iquest.net)      **Website address:** not applicable

**Judicial Appointee:** Honorable William E. Vance

**Plan Administrator:** Tammara Jo Sparks

**Names of Counties served:** Bartholomew, Brown, Decatur, Jackson, and Jennings

**Percentage of volunteer attorneys (as defined on page 6) who accepted a pro bono case in 2004 per registered attorneys in district, i.e. the district's pro bono participation rate** 42.3%  
**To the extent the pro bono participation rate information is available by county, please provide below.**

Bartholomew 43%, Brown 29.4%, Decatur 50%, Jackson 37.5%, Jennings 50%

**Amount of grant received for 2005:** \$14,000.00

**Amount of grant (2004 & prior years) projected to be unused as of 12/31/05:** \$0.00

**Amount requested for 2006:** \$34,483.00

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<b>PRO BONO DISTRICT NUMBER 11 LETTER OF REPRESENTATION</b>
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**The following representations**, made to the best of our knowledge and belief, are being provided to the Indiana Pro Bono Commission and Indiana Bar Foundation in anticipation of their review and evaluation of our funding request and our commitment and value to our Pro Bono District.

**Operation under Rule 6.6**

In submitting this application for funding, this district is representing itself as having a Pro Bono Plan, which is pursuant to **Rule 6.6** of the Indiana Rules of Professional Conduct. The plan enables attorneys in our district to discharge their professional responsibilities to provide civil legal pro bono services; improves the overall delivery of civil legal services to persons of limited means by facilitating the integration and coordination of services provided by pro bono organizations and other legal assistance organizations in our district; and ensures access to high quality and timely pro bono civil legal services for persons of limited means by (1) fostering the development of new civil legal pro bono programs where needed and (2) supporting and improving the quality of existing civil legal pro bono programs. The plan also fosters the growth of a public service culture within the district which values civil legal pro bono publico service and promotes the ongoing development of financial and other resources for civil legal pro bono organizations.

We have adhered to **Rule 6.6** (f) by having a district pro bono committee composed of:

- A. the judge designated by the Supreme Court to preside;
- B. to the extent feasible, one or more representatives from each voluntary bar association in the district, one representative from each pro bono and legal assistance provider in the district, and one representative from each law school in the district; and
- ~~C. at least two (2) community at large representatives, one of whom shall be a present or past recipient of pro bono publico legal services.~~

We have determined the governance of our district pro bono committee as well as the terms of service of our members. Replacement and succession members are appointed by the judge designated by the Supreme Court.

Pursuant to **Rule 6.6** (g) to ensure an active and effective district pro bono program, we:

- A. prepare in written form, on an annual basis, a district pro bono plan, including any county sub-plans if appropriate, after evaluating the needs of the district and making a determination of presently available pro bono services;
- B. select and employ a plan administrator to provide the necessary coordination and administrative support for the district pro bono committee;
- C. implement the district pro bono plan and monitor its results; and
- D. submit an annual report to the Commission.

## **Commitment to Pro Bono Program Excellence**

We also understand that ultimately the measure of success for a civil legal services program, whether a staffed or volunteer attorney program, is the outcomes achieved for clients, and the relationship of these outcomes to clients' most critical legal needs. We agree to strive for the following hallmarks which are characteristics enhancing a pro bono program's ability to succeed in providing effective services addressing clients' critical needs.

- 1. Participation by the local bar associations and attorneys.** The associations and attorneys believe the program is necessary and beneficial.
- 2. Centrality of client needs.** The mission of the program is to provide high quality free civil legal services to low-income persons through volunteer attorneys. Client needs drive the program, balanced by the nature and quantity of resources available.
- 3. Program priorities.** The program engages in a priority-setting process, which determines what types of problems the program will address. Resources are allocated to matters of greatest impact on the client and are susceptible to civil legal resolution. The program calls on civil legal providers and other programs serving low-income people to assist in this process.
- 4. Direct representation component.** The core of the program is direct representation in which volunteer attorneys engage in advocacy on behalf of low-income persons. Adjunct programs such as advice clinics, pro se clinics and paralegal assistance are dictated by client needs and support the core program.
- 5. Coordination with state and local civil legal providers and bar associations.** The programs work cooperatively with the local civil legal providers. The partnerships between the civil legal providers and the local bar association results in a variety of benefits including sharing of expertise, coordination of services, and creative solutions to problems faced by the client community.
- 6. Accountability.** The program has mechanisms for evaluating the quality of service it provides. It expects and obtains reporting from participating attorneys concerning the progress/outcome of referred cases. It has the capability to demonstrate compliance with requirements imposed by its funding source(s), and it has a grievance procedure for the internal resolution of disputes between attorneys and clients.
- 7. Continuity.** The program has a form of governance, which ensures the program will survive changes in bar leadership, and has operational guidelines, which enable the program to survive a change in staff.
- 8. Cost-effectiveness.** The program maximizes the level of high quality civil legal services it provides in relationship to the total amount of funding received.

**9. Minimization of barriers.** The program addresses in a deliberate manner linguistic, sensory, physical and cultural barriers to clients' ability to receive services from the program. The program does not create undue administrative barriers to client access.

**10. Understanding of ethical considerations.** The program operates in a way which is consistent with the Rules of Professional Conduct; client confidentiality is assured and conflicts of interest are avoided. The staff and volunteers are respectful of clients and sensitive to their needs.

**11. ABA Standards.** The program is designed to be as consistent with the ABA Standards for Programs Providing Civil Pro Bono Legal Services to Persons of Limited Means as possible.

No events, shortages or irregularities have occurred and no facts have been discovered which would make the financial statements provided to you materially inaccurate or misleading. To our knowledge there is nothing reflecting unfavorably upon the honesty or integrity of members of our organization. We have accounted for all known or anticipated operating revenue and expense in preparing our funding request.

We agree to provide human-interest stories promoting Pro Bono activities in a timely manner upon request of the Indiana Bar Foundation or Indiana Pro Bono Commission. We further agree to make ourselves available to meet with the Pro Bono Commission and/or the Indiana Bar Foundation to answer any questions or provide any material requested which serves as verification/source documentation for the submitted information.

**Explanation of items stricken from the above Letter of Representation:**

District 11 does not currently have a present or past recipient of services on the committee; however, efforts are underway to recruit one.

**It is understood that this Letter does not replace the Grant Agreement or other documents required by the Indiana Bar Foundation or Indiana Pro Bono Commission.**

**Signatures:**

William E. Vance  
Judicial Appointee Signature

6-15-2005  
Date

Tammara Jo Sparks  
Plan Administrator Signature

6-15-2005  
Date

## 2006 PLAN SUMMARY

- 1. Please write a brief summary of the 2006 grant request. Please include information regarding your district's planned activities including committee meetings, training, attorney recognition, newspaper or magazine articles, marketing and promotion. The grant request should cover needs to be addressed, methods, target audience, anticipated outcomes, and how past difficulties will be addressed.**

*Summary of Grant Request* - Legal Aid is requesting a grant of \$34,483.00 for 2006. This represents 20% of Legal Aid's 2006 total agency budget. Twenty percent was selected because pro bono referrals account for 20% of Legal Aid's caseload.

With this money Legal Aid will fund 20% of three employees salaries, 20% of rent, phone, postage, supplies, travel expenses, and malpractice insurance. This money will cover 100% of the cost of pro bono attorney expenses and 90% of the cost of the annual appreciation banquet. The grant also includes a request for \$1000.00 to cover costs associated with providing CLE training in each county.

### *Planned Activities:*

*Committee Meetings* – Legal Aid plans on having two committee meetings. The first will be set sometime between September of 2005 and January of 2006. The second will be held in conjunction with our volunteer appreciation banquet in May Of 2006.

*Training* – Legal Aid intends to provide at least one family law CLE training in each county by May of 2006. It is our intent to collaborate with Indiana Legal Services, Bloomington office and each county bar association on this project. The training will be free as long as the attorney signs an agreement to take a family law case in the next year; otherwise, there will be a fee for attendance.

*Attorney Recognition* - As always, Legal Aid will host the appreciation banquet in May of 2006. This event has grown in popularity since we began providing one hour of CLE with the program. In 2005 Legal Aid awarded the first District 11 Pro Bono Attorney of the Year Award. This award is given to the volunteer attorney that reports the most closing hours for the year. Legal Aid also intends to write press releases on a quarterly basis which will recognize the attorneys and their contributions.

*Marketing and Promotion* - The plan administrator and the Legal Aid Board president are currently arranging dates to travel to each county and meet with the judges. It is our intention to make them more aware of Legal Aid's services, encourage them to promote pro bono in their counties, and to determine what Legal Aid can do for them.

The plan administrator also intends on traveling to each county to meet with area social service providers to make them aware of the services Legal Aid provides and to develop informal referral collaborations.

*Newspaper or Magazine Articles* –Legal Aid feels that this is one area that it must improve upon. Legal Aid needs to "toot its own horn" and those of our volunteers. For 2006, the goal is to find something newsworthy at least once per quarter. These press releases will then be sent to all newspapers in the five county area.

*Focus for 2006:* Increase participation by attorneys who have agreed to be on the pro bono panel. There are 141 lawyers who have agreed to be on our pro bono panel and only 84 were active in 2004. As of June 24, 2005, only 52 lawyers have accepted cases. Because the majority of referrals are family law issues and many of our panel members do not feel comfortable taking family law cases, it is imperative that we offer them training (see *Training* above). It is our hope that this training will increase the number of attorneys accepting cases. The plan administrator also feels that face-to-face contact with these attorneys may have an impact on their reluctance to take cases. She is planning on meeting face-to-face with all 57 attorneys that did not participate in 2004; however, if that is not possible, then at least by phone.

## REPORT OF VOLUNTEER ATTORNEY CASES IN DISTRICT 11

Name of Pro Bono Provider: **Bartholomew Area Legal Aid, Inc.**

*\*\*Bartholomew Area Legal Aid, Inc. is the only pro bono provider in District 11 and is the only agency that receives IOLTA funding.*

**IOLTA funding accounts for 11.7 % of total pro bono provider budget. Please state the percentage of volunteers and cases which are attributable to IOLTA funding 33%. If this percentage is substantially more than the percentage of IOLTA funding, please explain.**

Bartholomew Area Legal Aid, Inc. is the only Pro Bono provider in District 11. Unlike many of the Pro Bono programs in Indiana that began in 2001, Legal Aid began in 1981. Legal Aid had already established an extremely successful program for providing pro bono referrals to citizens of Bartholomew County. Therefore, Legal Aid attributes all referrals in Brown, Decatur, Jackson and Jennings to IOLTA funding since Legal Aid would not be making pro bono referrals in those counties but for IOLTA funding. Legal Aid has been very successful in duplicating its program for those other four counties. Referrals in those four counties increased by 65% between the formation of the program in 2001 and 2003. Unfortunately, Legal Aid has not been as successful in raising funds to support the program in the other four counties.

Legal Aid has applied for funding from every available United Way or United Fund agency in Brown, Decatur, Jackson, and Jennings counties. Legal Aid has also applied for funding from foundations in Brown and Jackson counties. Legal Aid has received a total of \$4210.00 as a result of those requests (\$2,210.00 from Jennings County United Way for 2005 and \$2,000.00 from Decatur County United Fund for 2006).

In 2002, the Pro Bono Commission provided Legal Aid with sufficient funding to expand our program to cover the additional four counties. However, funding has been cut each year since and Legal Aid has operated at a deficit budget since 2003 when IOLTA funding was first cut. IOLTA funding was cut again in 2005, causing Legal Aid to suffer even larger deficits. As successful as the District 11 pro bono program has become, it cannot continue to drain the resources of Legal Aid.

Budget breakdowns by county show that Bartholomew County was completely funded in 2003 and 2004 and is short by \$275.00 in 2005. Brown County was underfunded by \$1,617.00 in 2003, \$2,545.00 in 2004, and \$2,775.00 in 2005. Decatur County was underfunded by \$1,754.00 in 2003, \$3067.00 in 2004, and \$3,233.00 in 2004. Jackson County was underfunded by \$4,346.00 in 2003, \$6,166.00 in 2004, and \$6711.00 in 2005. Jennings County was underfunded by \$3,413.00 in 2003, \$5,529.00 in 2004, and \$3,907 in 2005.

Brown, Decatur, Jackson and Jennings counties represent 33% of Legal Aid's pro bono referrals. It is only because the Legal Aid Board, prior to 2001, had accumulated a cash reserve that Legal Aid has been able to continue operations in all five counties. Due to the fact that Legal Aid's cash reserve is being depleted at an alarming rate, that Bartholomew County funding sources are not willing to fund other counties, that Legal Aid has been unsuccessful in obtaining funding from the other four counties, and the fact that IOLTA funding does not cover the deficits, Legal Aid must seriously consider our willingness to continue to administer the program.

In order to continue to provide services to Brown, Decatur, Jackson, and Jennings counties, Legal Aid must obtain increased funding from the Pro Bono Commission.

Legal Aid did a cost benefit analysis based on the 2004 reports that are available on the Pro Bono Commission website. Based on this analysis, District 11 has the best cost/benefit ratio of

any District in the state. In 2002, the cost per case in District 11 was \$92.61; the state average (based on five districts reporting number of cases) was \$653.60. In 2003, the cost per case in District 11 was \$58.93; the state average (based on twelve districts reporting number of cases) was \$401.63. If Legal Aid maintains the number of cases they reported in 2004 (263) in 2006 and receives their requested funding for 2006 (\$34,483.00), the cost per case for District 11 in 2006 would be \$131.11. This is still far below the state average.

Volunteer Attorney Name	County	Year Case Accepted	Year Case Closed	Number of Hours	Problem Code
<b>Lisa Anderson</b>	Bartholomew	2004	2004	22.2	32
	Bartholomew	2001	2004	105.8	31
<b>Gerald Angermeier</b>	Bartholomew	2003	2004	5.53	32
	Bartholomew	2004	2004	1.0	32
	Bartholomew	2003	2004	8.15	32
	Bartholomew	2000	2004	7.2	31
	Bartholomew	2001	2004	130.30	32
	Bartholomew	2004	2004	10.40	32
	Bartholomew	2004	2004	2.0	32
	Bartholomew	2004	2004	1.0	32
	Bartholomew	2003	2004	28.12	32
	Bartholomew	2004	2004	1.0	31
	Bartholomew	2004	pending	-	36
<b>Gene Arnholt</b>	Bartholomew	2004	2004	5.45	31
	Bartholomew	2004	2004	0	38
	Bartholomew	2001	2004	9.12	32
	Bartholomew	2001	2004	33.35	32
	Bartholomew	2003	2004	1.0	69
	Bartholomew	2003	2004	10.0	32
	Bartholomew	2003	2004	0	36
	Bartholomew	2002	2004	2.4	39
	Bartholomew	2003	2004	1.0	32
	Bartholomew	2004	2004	2.83	51
	Bartholomew	2002	2004	4.77	32
	Bartholomew	2003	2004	8.41	31
	Bartholomew	2003	2004	1.2	33
	Bartholomew	2001	2004	10.1	32
	Bartholomew	2003	2004	7.5	31
	Bartholomew	2004	pending	-	38
	Bartholomew	2004	pending	-	32
	Bartholomew	2003	pending	-	31
	Bartholomew	2004	pending	-	31
	Bartholomew	2002	pending	-	31
	Bartholomew	2001	pending	-	31
<b>Arthur Beck</b>	Bartholomew	2003	2004	7.75	38
<b>Jeffrey Beck</b>	Bartholomew	2003	2004	25.2	3

<b>Jeffrey Beck cont.</b>	<b>Bartholomew</b>	<b>2004</b>	pending	-	<b>32</b>
<b>Cynthia Boll</b>	<b>Bartholomew</b>	<b>2004</b>	<b>2004</b>	<b>1.0</b>	<b>32</b>
	<b>Bartholomew</b>	<b>2004</b>	<b>2004</b>	<b>1.0</b>	<b>32</b>
	<b>Bartholomew</b>	<b>2003</b>	pending	-	<b>33</b>
	<b>Bartholomew</b>	<b>2002</b>	pending	-	<b>32</b>
	<b>Bartholomew</b>	<b>2001</b>	pending	-	<b>9</b>
	<b>Bartholomew</b>	<b>2003</b>	pending	-	<b>33</b>
	<b>Bartholomew</b>	<b>2004</b>	pending	-	<b>32</b>
<b>Kirsten Bouthier</b>	<b>Bartholomew</b>	<b>2004</b>	<b>2004</b>	<b>5.0</b>	<b>39</b>
<b>Kathleen Tighe Coriden</b>	<b>Bartholomew</b>	<b>2003</b>	<b>2004</b>	<b>1.5</b>	<b>36</b>
	<b>Bartholomew</b>	<b>2004</b>	<b>2004</b>	<b>6.6</b>	<b>32</b>
	<b>Bartholomew</b>	<b>2003</b>	<b>2004</b>	<b>15.6</b>	<b>32</b>
	<b>Bartholomew</b>	<b>2004</b>	<b>2004</b>	<b>1.0</b>	<b>31</b>
	<b>Bartholomew</b>	<b>2004</b>	pending	-	<b>31</b>
	<b>Bartholomew</b>	<b>2004</b>	pending	-	<b>39</b>
<b>Terrence Coriden</b>	<b>Bartholomew</b>	<b>2004</b>	<b>2004</b>	<b>1.0</b>	<b>36</b>
	<b>Bartholomew</b>	<b>2004</b>	pending	-	<b>69</b>
	<b>Bartholomew</b>	<b>2002</b>	pending	-	<b>31</b>
	<b>Bartholomew</b>	<b>2004</b>	pending	-	<b>32</b>
	<b>Bartholomew</b>	<b>2002</b>	pending	-	<b>32</b>
	<b>Bartholomew</b>	<b>2002</b>	pending	-	<b>38</b>
	<b>Bartholomew</b>	<b>2002</b>	pending	-	<b>31</b>
	<b>Bartholomew</b>	<b>2004</b>	pending	-	<b>32</b>
	<b>Bartholomew</b>	<b>2003</b>	pending	-	<b>31</b>
	<b>Bartholomew</b>	<b>2004</b>	pending	-	<b>32</b>
<b>Timothy Coriden</b>	<b>Bartholomew</b>	<b>2004</b>	<b>2004</b>	<b>8.0</b>	<b>38</b>
	<b>Bartholomew</b>	<b>2002</b>	<b>2004</b>	<b>17.5</b>	<b>31</b>
	<b>Bartholomew</b>	<b>2002</b>	pending	-	<b>32</b>
	<b>Bartholomew</b>	<b>2004</b>	pending	-	<b>31</b>
	<b>Bartholomew</b>	<b>2003</b>	pending	-	<b>32</b>
	<b>Bartholomew</b>	<b>2003</b>	pending	-	<b>33</b>
	<b>Bartholomew</b>	<b>2003</b>	pending	-	<b>32</b>
	<b>Bartholomew</b>	<b>2003</b>	pending	-	<b>32</b>
	<b>Bartholomew</b>	<b>2004</b>	pending	-	<b>33</b>
	<b>Bartholomew</b>	<b>2002</b>	pending	-	<b>31</b>
	<b>Bartholomew</b>	<b>2002</b>	pending	-	<b>32</b>
	<b>Bartholomew</b>	<b>2003</b>	pending	-	<b>2</b>
	<b>Bartholomew</b>	<b>2003</b>	pending	-	<b>32</b>
	<b>Bartholomew</b>	<b>2003</b>	pending	-	<b>32</b>
<b>F. Jefferson Crump</b>	<b>Bartholomew</b>	<b>2004</b>	<b>2004</b>	<b>6.22</b>	<b>32</b>
	<b>Bartholomew</b>	<b>2004</b>	<b>2004</b>	<b>5.6</b>	<b>95</b>
	<b>Bartholomew</b>	<b>2004</b>	<b>2004</b>	<b>8.2</b>	<b>39</b>
	<b>Bartholomew</b>	<b>2004</b>	<b>2004</b>	<b>8.06</b>	<b>32</b>
	<b>Bartholomew</b>	<b>2003</b>	<b>2004</b>	<b>8.5</b>	<b>69</b>
	<b>Bartholomew</b>	<b>2003</b>	pending	-	<b>32</b>
	<b>Bartholomew</b>	<b>2004</b>	pending	-	<b>32</b>
	<b>Bartholomew</b>	<b>2004</b>	pending	-	<b>9</b>



<b>Robert Dalmbert</b>	Bartholomew	2004	2004	3.5	33
	Bartholomew	2003	2004	4.5	31
	Bartholomew	2003	2004	12.5	32
<b>Aaron Edwards</b>	Bartholomew	2003	2004	6.5	36
	Bartholomew	2004	2004	1.0	33
	Bartholomew	2004	pending	-	32
<b>Donald Edwards</b>	Bartholomew	2003	2004	4.0	32
	Bartholomew	2003	2004	3.5	31
	Bartholomew	2004	2004	1.0	32
	Bartholomew	2004	pending	-	32
<b>Carrie Frantz</b>	Bartholomew	2004	2004	3.0	39
<b>William Garber</b>	Bartholomew	2004	2004	1.0	32
	Bartholomew	2004	2004	5.0	31
	Bartholomew	2003	2004	5.5	32
	Bartholomew	2004	2004	0	30
	Bartholomew	2003	2004	6.5	32
	Bartholomew	2003	2004	5.0	32
	Bartholomew	2003	2004	5.0	39
	Bartholomew	2004	2004	12.0	31
	Bartholomew	2004	2004	0	32
	Bartholomew	2004	pending	-	32
	Bartholomew	2004	pending	-	32
	Bartholomew	2003	pending	-	31
	Bartholomew	2004	pending	-	42
<b>Dominic Glover</b>	Bartholomew	2003	2004	13.8	9
	Bartholomew	2004	2004	0	32
	Bartholomew	2003	2004	9.5	31
	Bartholomew	2003	2004	7.07	42
	Bartholomew	2004	2004	6.7	32
	Bartholomew	2003	2004	5.5	32
	Bartholomew	2004	pending	-	32
	Bartholomew	2004	pending	-	31
	Bartholomew	2004	pending	-	32
<b>Jason Guthrie</b>	Bartholomew	2003	2004	32.25	31
	Bartholomew	2003	2004	15.25	69
	Bartholomew	2004	2004	1.0	2
	Bartholomew	2002	pending	-	31
	Bartholomew	2003	pending	-	33
	Bartholomew	2003	pending	-	42
	Bartholomew	2004	pending	-	32
<b>Landyn Harmon</b>	Bartholomew	2003	2004	4.0	31
	Bartholomew	2004	2004	1.0	32
	Bartholomew	2004	2004	1.0	32
	Bartholomew	2003	2004	30.0	31
	Bartholomew	2004	pending	-	32
	Bartholomew	2004	pending	-	39
	Bartholomew	2003	pending	-	36

<b>Landyn Harmon cont.</b>	Bartholomew	2004	pending	-	31
<b>Patrick Harrison</b>	Bartholomew	2004	2004	1.0	9
	Bartholomew	2003	2004	4.5	94
<b>Eric Hayes</b>	Bartholomew	2003	2004	6.0	31
	Bartholomew	2003	2004	6.5	31
	Bartholomew	2004	2004	1.0	31
	Bartholomew	2004	pending	-	32
	Bartholomew	2004	pending	-	31
<b>James Holland</b>	Bartholomew	2003	2004	8.9	33
	Bartholomew	2004	2004	4.0	32
	Bartholomew	2003	2004	8.65	32
	Bartholomew	2002	2004	7.85	42
	Bartholomew	2002	2004	1.0	3
	Bartholomew	2003	2004	1.0	39
	Bartholomew	2004	2004	3.6	42
	Bartholomew	2004	pending	-	32
	Bartholomew	2004	pending	-	31
	Bartholomew	2004	pending	-	31
	Bartholomew	2004	pending	-	42
<b>David Hooper</b>	Bartholomew	2003	2004	6.0	32
	Bartholomew	2004	2004	0.25	32
	Bartholomew	2004	2004	5.5	31
	Bartholomew	2003	2004	4.5	32
	Bartholomew	2004	2004	0	32
	Bartholomew	2004	pending	-	38
<b>Jeffrey Jackson</b>	Bartholomew	2004	2004	3.0	32
	Bartholomew	2004	2004	3.0	33
	Bartholomew	2004	2004	2.0	32
	Bartholomew	2004	pending	-	32
<b>J. Michael Kummerer</b>	Bartholomew	2001	2004	9.0	31
	Bartholomew	2004	2004	10.0	33
	Bartholomew	2004	2004	2.5	31
	Bartholomew	2003	2004	6.0	32
	Bartholomew	2002	2004	10.0	31
	Bartholomew	2003	2004	6.0	42
	Bartholomew	2004	pending	-	32
	Bartholomew	2004	pending	-	32
	Bartholomew	2004	pending	-	42
<b>C. Richard Marshall</b>	Bartholomew	2003	2004	6.5	32
	Bartholomew	2002	2004	2.0	38
	Bartholomew	2002	2004	0	59
	Bartholomew	2003	2004	3.0	32
	Bartholomew	2003	2004	49.5	31
	Bartholomew	2001	pending	-	32
	Bartholomew	2004	pending	-	31
	Bartholomew	2004	pending	-	32
	Bartholomew	2004	pending	-	32

<b>C. Richard Marshall</b> <small>cont</small>	Bartholomew	2004	pending	-	32
	Bartholomew	2001	pending	-	38
<b>Kathy Molewyk</b>	Bartholomew	2003	2004	6.0	32
	Bartholomew	2004	2004	2.5	32
	Bartholomew	2003	2004	1.0	31
	Bartholomew	2004	2004	15.6	31
	Bartholomew	2004	pending	-	32
<b>Thomas Mote</b>	Bartholomew	2003	2004	6.0	32
<b>David Nowak</b>	Bartholomew	2004	2004	3.0	32
	Bartholomew	2004	2004	2.0	38
	Bartholomew	2004	2004	1.0	32
	Bartholomew	2004	2004	4.0	32
	Bartholomew	2001	2004	65.0	42
	Bartholomew	2004	pending	-	39
	Bartholomew	2004	pending	-	32
	Bartholomew	2003	pending	-	32
<b>Karon Perkins</b>	Bartholomew	2003	2004	6.0	32
	Bartholomew	2003	2004	1.0	32
	Bartholomew	2002	2004	1.0	39
<b>Jerry Prall</b>	Bartholomew	2003	2004	6.0	32
	Bartholomew	2004	2004	36.18	32
	Bartholomew	2004	2004	14.3	31
	Bartholomew	2003	2004	1.0	33
	Bartholomew	2003	2004	4.54	32
	Bartholomew	2004	2004	2.5	38
	Bartholomew	2004	pending	-	32
<b>Jeff Rocker</b>	Bartholomew	2004	2004	1.0	33
	Bartholomew	2003	2004	3.5	33
	Bartholomew	2003	2004	2.0	33
	Bartholomew	2004	pending	-	33
<b>Otto Schug</b>	Bartholomew	2003	2004	4.0	33
	Bartholomew	2004	2004	1.0	39
	Bartholomew	2004	2004	0	33
	Bartholomew	2003	2004	0	33
	Bartholomew	2004	2004	1.0	33
	Bartholomew	2004	2004	1.0	33
	Bartholomew	2004	2004	1.5	33
	Bartholomew	2004	2004	3.5	95
	Bartholomew	2003	2004	3.25	99
<b>James Shoaf</b>	Bartholomew	2004	2004	2.0	32
	Bartholomew	2004	2004	1.0	32
	Bartholomew	2003	2004	3.0	33
	Bartholomew	2004	2004	7.0	32
	Bartholomew	2004	2004	6.5	31
	Bartholomew	2004	pending	-	33
	Bartholomew	2003	pending	-	36
	Bartholomew	2004	pending	-	31

<b>James Shoaf cont</b>	Bartholomew	2004	pending	-	31
<b>Dennis Stark</b>	Bartholomew	2003	2004	3.0	39
	Bartholomew	2004	2004	1.0	33
	Bartholomew	2003	2004	3.0	32
	Bartholomew	2004	2004	6.5	31
	Bartholomew	2003	2004	3.0	31
	Bartholomew	2003	2004	3.0	32
	Bartholomew	2004	pending	-	32
<b>John Stroh</b>	Bartholomew	2004	2004	12.0	31
	Bartholomew	2004	2004	0	32
	Bartholomew	2004	2004	1.0	31
	Bartholomew	2004	2004	7.5	31
	Bartholomew	2003	2004	43.3	32
	Bartholomew	2003	2004	10.4	32
	Bartholomew	2004	pending	-	94
<b>Michael Thomasson</b>	Bartholomew	2003	2004	6.0	32
<b>Sean Thomasson</b>	Bartholomew	2003	2004	30.0	32
	Bartholomew	2004	2004	1.0	32
	Bartholomew	2004	pending	-	32
<b>Grant Tucker</b>	Bartholomew	2003	2004	2.3	32
	Bartholomew	2004	2004	0	36
	Bartholomew	2003	2004	1.0	38
	Bartholomew	2004	pending	-	32
	Bartholomew	2003	pending	-	32
	Bartholomew	2004	pending	-	2
<b>James Voelz</b>	Bartholomew	2003	2004	5.0	69
<b>Timothy Vrana</b>	Bartholomew	2004	2004	2.6	51
	Bartholomew	2001	2004	23.45	75
	Bartholomew	2003	2004	18.65	74
	Bartholomew	2004	pending	-	75
	Bartholomew	2004	pending	-	74
	Bartholomew	2004	pending	-	74
	Bartholomew	2004	pending	-	75
<b>Jeff Washburn</b>	Bartholomew	2003	2004	1.0	32
	Bartholomew	2003	2004	42.05	3
	Bartholomew	2004	2004	3.75	62
	Bartholomew	2004	2004	2.0	31
	Bartholomew	2004	2004	4.7	32
	Bartholomew	2004	2004	1.0	32
	Bartholomew	2004	pending	-	32
<b>Charles Wells</b>	Bartholomew	2004	2004	8.25	32
	Bartholomew	2003	2004	1.0	31
	Bartholomew	2004	2004	0	32
	Bartholomew	2003	2004	0	31
<b>Alan Whitted</b>	Bartholomew	2003	2004	6.0	31
	Bartholomew	2003	2004	4.0	32
	Bartholomew	2003	2004	1.0	32

<b>Alan Whitted cont</b>	<b>Bartholomew</b>	<b>2003</b>	<b>2004</b>	<b>1.0</b>	<b>32</b>
	<b>Bartholomew</b>	<b>2004</b>	<b>2004</b>	<b>5.0</b>	<b>39</b>
	<b>Bartholomew</b>	<b>2003</b>	<b>2004</b>	<b>1.0</b>	<b>32</b>
	<b>Bartholomew</b>	<b>2003</b>	<b>2004</b>	<b>5.0</b>	<b>33</b>
	<b>Bartholomew</b>	<b>2003</b>	<b>2004</b>	<b>6.5</b>	<b>32</b>
	<b>Bartholomew</b>	<b>2004</b>	pending	-	<b>32</b>
	<b>Bartholomew</b>	<b>2004</b>	pending	-	<b>31</b>
	<b>Bartholomew</b>	<b>2004</b>	pending	-	<b>32</b>
	<b>Bartholomew</b>	<b>2004</b>	pending	-	<b>32</b>
	<b>Bartholomew</b>	<b>2004</b>	pending	-	<b>32</b>
<b>Thomas Barr</b>	<b>Brown</b>	<b>2004</b>	pending	-	<b>32</b>
<b>Jay Charon</b>	<b>Brown</b>	<b>2004</b>	pending	-	<b>32</b>
<b>David Grupenhoff</b>	<b>Brown</b>	<b>2003</b>	<b>2004</b>	<b>0</b>	<b>32</b>
	<b>Brown</b>	<b>2003</b>	pending	-	<b>31</b>
<b>Carl Lamb</b>	<b>Brown</b>	<b>2004</b>	<b>2004</b>	<b>2.0</b>	<b>31</b>
<b>Heather Mollo</b>	<b>Brown</b>	<b>2002</b>	<b>2004</b>	<b>2.0</b>	<b>32</b>
	<b>Brown</b>	<b>2003</b>	<b>2004</b>	<b>2.0</b>	<b>32</b>
	<b>Brown</b>	<b>2004</b>	pending	-	<b>32</b>
	<b>Brown</b>	<b>2004</b>	pending	-	<b>32</b>
<b>Cynthia Rose</b>	<b>Brown</b>	<b>2004</b>	pending	-	<b>31</b>
<b>Jason Salerno</b>	<b>Brown</b>	<b>2002</b>	<b>2004</b>	<b>5.0</b>	<b>39</b>
<b>Sharon Wildey</b>	<b>Brown</b>	<b>2002</b>	<b>2004</b>	<b>7.0</b>	<b>32</b>
	<b>Brown</b>	<b>2003</b>	<b>2004</b>	<b>0</b>	<b>31</b>
	<b>Brown</b>	<b>2002</b>	<b>2004</b>	<b>10.0</b>	<b>32</b>
	<b>Brown</b>	<b>2003</b>	<b>2004</b>	<b>2.0</b>	<b>31</b>
	<b>Brown</b>	<b>2003</b>	<b>2004</b>	<b>6.5</b>	<b>32</b>
<b>Kurt Young</b>	<b>Brown</b>	<b>2004</b>	<b>2004</b>	<b>1.0</b>	<b>32</b>
<b>Kelly Baldwin</b>	<b>Decatur</b>	<b>2003</b>	<b>2004</b>	<b>12.8</b>	<b>31</b>
<b>Kenneth Bass</b>	<b>Decatur</b>	<b>2002</b>	<b>2004</b>	<b>11.2</b>	<b>32</b>
	<b>Decatur</b>	<b>2003</b>	<b>2004</b>	<b>1.0</b>	<b>31</b>
	<b>Decatur</b>	<b>2003</b>	<b>2004</b>	<b>1.0</b>	<b>32</b>
<b>Timothy Day</b>	<b>Decatur</b>	<b>2004</b>	pending	-	<b>30</b>
<b>Frank Hamilton</b>	<b>Decatur</b>	<b>2003</b>	<b>2004</b>	<b>1.0</b>	<b>32</b>
	<b>Decatur</b>	<b>2004</b>	<b>2004</b>	<b>5.0</b>	<b>31</b>
	<b>Decatur</b>	<b>2004</b>	<b>2004</b>	<b>1.0</b>	<b>32</b>
	<b>Decatur</b>	<b>2004</b>	<b>2004</b>	<b>4.0</b>	<b>32</b>
	<b>Decatur</b>	<b>2003</b>	<b>2004</b>	<b>4.0</b>	<b>32</b>
<b>James Pruett</b>	<b>Decatur</b>	<b>2004</b>	<b>2004</b>	<b>1.0</b>	<b>32</b>
	<b>Decatur</b>	<b>2004</b>	pending	-	<b>32</b>
<b>William Robbins</b>	<b>Decatur</b>	<b>2004</b>	<b>2004</b>	<b>6.0</b>	<b>32</b>
<b>Melissa Scholl</b>	<b>Decatur</b>	<b>2004</b>	<b>2004</b>	<b>3.8</b>	<b>39</b>
	<b>Decatur</b>	<b>2004</b>	<b>2004</b>	<b>1.0</b>	<b>32</b>
	<b>Decatur</b>	<b>2003</b>	<b>2004</b>	<b>2.2</b>	<b>32</b>
<b>Scott Simmonds</b>	<b>Decatur</b>	<b>2004</b>	pending	-	<b>99</b>
<b>Stephen Taylor</b>	<b>Decatur</b>	<b>2004</b>	<b>2004</b>	<b>3.5</b>	<b>31</b>
	<b>Decatur</b>	<b>2002</b>	<b>2004</b>	<b>1.5</b>	<b>32</b>
	<b>Decatur</b>	<b>2002</b>	<b>2004</b>	<b>3.0</b>	<b>32</b>

<b>Christopher Tebbe</b>	<b>Decatur</b>	<b>2004</b>	<b>2004</b>	<b>4.0</b>	<b>38</b>
	<b>Decatur</b>	<b>2004</b>	pending	-	<b>31</b>
	<b>Decatur</b>	<b>2003</b>	pending	-	<b>32</b>
	<b>Decatur</b>	<b>2004</b>	pending	-	<b>32</b>
<b>Steven Teverbaugh</b>	<b>Decatur</b>	<b>2004</b>	pending	-	<b>32</b>
<b>Karl Walker</b>	<b>Decatur</b>	<b>2004</b>	<b>2004</b>	<b>4.0</b>	<b>32</b>
	<b>Decatur</b>	<b>2003</b>	<b>2004</b>	<b>1.0</b>	<b>31</b>
	<b>Decatur</b>	<b>2002</b>	pending	-	<b>32</b>
	<b>Decatur</b>	<b>2004</b>	pending	-	<b>32</b>
<b>Denise Connell</b>	<b>Jackson</b>	<b>2004</b>	<b>2004</b>	<b>8.50</b>	<b>33</b>
<b>Rodney Farrow</b>	<b>Jackson</b>	<b>2004</b>	<b>2004</b>	<b>1.0</b>	<b>32</b>
	<b>Jackson</b>	<b>2003</b>	<b>2004</b>	<b>1.1</b>	<b>69</b>
	<b>Jackson</b>	<b>2004</b>	pending	-	<b>31</b>
<b>Thomas Lantz</b>	<b>Jackson</b>	<b>2004</b>	<b>2004</b>	<b>12.00</b>	<b>32</b>
	<b>Jackson</b>	<b>2004</b>	<b>2004</b>	<b>8.65</b>	<b>32</b>
	<b>Jackson</b>	<b>2003</b>	<b>2004</b>	<b>19.42</b>	<b>32</b>
	<b>Jackson</b>	<b>2004</b>	pending	-	<b>32</b>
<b>Bruce MacTavish</b>	<b>Jackson</b>	<b>2004</b>	<b>2004</b>	<b>10.00</b>	<b>33</b>
	<b>Jackson</b>	<b>2004</b>	pending	-	<b>33</b>
<b>Mercedes Plummer</b>	<b>Jackson</b>	<b>2004</b>	<b>2004</b>	<b>3.50</b>	<b>38</b>
	<b>Jackson</b>	<b>2003</b>	<b>2004</b>	<b>45.0</b>	<b>32</b>
<b>Ryan Redmon</b>	<b>Jackson</b>	<b>2003</b>	<b>2004</b>	<b>4.0</b>	<b>42</b>
	<b>Jackson</b>	<b>2003</b>	<b>2004</b>	<b>1.0</b>	<b>31</b>
	<b>Jackson</b>	<b>2003</b>	pending	-	<b>32</b>
	<b>Jackson</b>	<b>2003</b>	pending	-	<b>32</b>
	<b>Jackson</b>	<b>2003</b>	pending	-	<b>32</b>
	<b>Jackson</b>	<b>2003</b>	pending	-	<b>32</b>
	<b>Jackson</b>	<b>2004</b>	pending	-	<b>31</b>
	<b>Jackson</b>	<b>2002</b>	pending	-	<b>31</b>
	<b>Jackson</b>	<b>2004</b>	pending	-	<b>32</b>
<b>Joseph Robertson</b>	<b>Jackson</b>	<b>2004</b>	<b>2004</b>	<b>0</b>	<b>32</b>
	<b>Jackson</b>	<b>2004</b>	<b>2004</b>	<b>0</b>	<b>32</b>
	<b>Jackson</b>	<b>2004</b>	<b>2004</b>	<b>1.0</b>	<b>32</b>
	<b>Jackson</b>	<b>2003</b>	<b>2004</b>	<b>7.25</b>	<b>33</b>
	<b>Jackson</b>	<b>2003</b>	<b>2004</b>	<b>1.0</b>	<b>31</b>
	<b>Jackson</b>	<b>2004</b>	pending	-	<b>32</b>
	<b>Jackson</b>	<b>2004</b>	pending	-	<b>32</b>
<b>Travis Thompson</b>	<b>Jackson</b>	<b>2003</b>	<b>2004</b>	<b>25.0</b>	<b>31</b>
	<b>Jackson</b>	<b>2003</b>	<b>2004</b>	<b>10.0</b>	<b>32</b>
	<b>Jackson</b>	<b>2004</b>	pending	-	<b>32</b>
	<b>Jackson</b>	<b>2004</b>	pending	-	<b>31</b>
<b>Brian Belding</b>	<b>Jennings</b>	<b>2004</b>	<b>2004</b>	<b>0</b>	<b>32</b>
	<b>Jennings</b>	<b>2003</b>	<b>2004</b>	<b>1.0</b>	<b>32</b>
	<b>Jennings</b>	<b>2003</b>	<b>2004</b>	<b>3.5</b>	<b>31</b>
	<b>Jennings</b>	<b>2004</b>	<b>2004</b>	<b>0</b>	<b>32</b>
	<b>Jennings</b>	<b>2002</b>	<b>2004</b>	<b>1.0</b>	<b>32</b>
	<b>Jennings</b>	<b>2004</b>	<b>2004</b>	<b>1.0</b>	<b>32</b>
	<b>Jennings</b>	<b>2003</b>	<b>2004</b>	<b>6.0</b>	<b>32</b>

<b>Brian Belding cont.</b>	Jennings	2004	2004	1.0	32
	Jennings	2003	2004	1.0	31
	Jennings	2004	pending	-	32
<b>Robert Brown</b>	Jennings	2004	2004	1.0	32
	Jennings	2002	2004	4.0	32
	Jennings	2003	2004	6.0	31
	Jennings	2004	2004	1.0	32
	Jennings	2004	2004	10.0	32
	Jennings	2004	2004	0	32
	Jennings	2004	pending	-	32
	Jennings	2004	pending	-	32
<b>Jennifer Joas</b>	Jennings	2004	pending	-	32
<b>Bradley Kage</b>	Jennings	2003	2004	3.0	32
	Jennings	2003	2004	0	32
	Jennings	2003	2004	0	33
	Jennings	2003	2004	2.0	31
	Jennings	2004	2004	4.0	31
	Jennings	2004	pending	-	31
	Jennings	2004	pending	-	32
<b>Ben Loheide</b>	Jennings	2004	2004	1.0	32
	Jennings	2004	2004	1.0	69
	Jennings	2004	2004	5.0	31
	Jennings	2004	pending	-	32
	Jennings	2004	pending	-	32
	Jennings	2004	pending	-	32
<b>Alan Marshall</b>	Jennings	2004	2004	1.0	32
	Jennings	2003	2004	6.0	32
	Jennings	2004	pending	-	32
<b>Jason Pattison</b>	Jennings	2003	2004	1.0	31
	Jennings	2003	2004	5.0	32
	Jennings	2004	2004	1.0	32
	Jennings	2004	2004	2.0	31
	Jennings	2002	2004	28.5	32
	Jennings	2004	pending	-	32
<b>John Roche</b>	Jennings	2004	2004	3.3	32
	Jennings	2003	2004	2.7	32
	Jennings	2003	2004	3.2	31
	Jennings	2001	2004	9.7	32
	Jennings	2003	2004	4.9	63
	Jennings	2003	2004	1.0	3
	Jennings	2003	2004	6.5	31
	Jennings	2004	2004	1.0	31
	Jennings	2002	2004	6.5	32
	Jennings	2003	2004	2.2	38
	Jennings	2004	2004	3.0	32
	Jennings	2004	pending	-	31
	Jennings	2004	pending	-	32

<b>John Roche cont</b>	<b>Jennings</b>	<b>2004</b>	pending	-	<b>38</b>
<b>Susan Sparks</b>	<b>Jennings</b>	<b>2003</b>	<b>2004</b>	<b>1.0</b>	<b>62</b>
	<b>Jennings</b>	<b>2003</b>	<b>2004</b>	<b>1.0</b>	<b>69</b>
	<b>Jennings</b>	<b>2003</b>	<b>2004</b>	<b>3.5</b>	<b>39</b>
	<b>Jennings</b>	<b>2003</b>	<b>2004</b>	<b>4.5</b>	<b>31</b>
	<b>Jennings</b>	<b>2004</b>	pending	-	<b>31</b>
<b>TOTAL:</b> Overall total number of volunteer attorneys:	<b>82</b>	<b>TOTAL:</b> Overall total number of cases accepted or pending:	<b>263</b>	<b>TOTAL:</b> Overall total hours on closed cases:	<b>1850.62</b>



## **2004 REPORT OF VOLUNTEER ATTORNEY LIMITED INFORMATION ACTIVITY IN DISTRICT 11**

**Name of Pro Bono Provider: Bartholomew Area Legal Aid, Inc.**

*\*\*Bartholomew Area Legal Aid, Inc. is the only pro bono provider in District 11 and is the only agency that receives IOLTA funding.*

District 11 does not have any *volunteer* limited legal information activity to report; however, this is because Bartholomew Area Legal Aid, Inc. (Legal Aid) provides those services to District 11. Unlike many districts, which participate in Talk To A Lawyer Day, every day is Talk To A Lawyer Day in District 11. Legal Aid offers phone and walk-in services five days per week. If an applicant is eligible and has an immediate need for legal advice, they are able to talk to an attorney at that time. Legal Aid also offers one-on-one pro se assistance to eligible applicants. Legal Aid also offers “You and the Law” clinics for District 11. Social service providers in the area request these clinics for their clients. Legal Aid provides the lawyer and the materials. Funding for the above programs comes from Civil Legal Aid Fund, Bartholomew County United Way, Indiana Criminal Justice Institute – VOCA grant, and Family and Social Services Administration – Father’s grant.

2004 REPORT
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**Please list your District's 2004 activities--including committee meetings, training, attorney recognition, newspaper or magazine articles, marketing and promotion--in chronological order.**

<u>Date</u>	<u>Activity</u>
January	Referred 22 cases to pro bono attorneys
February	Referred 6 cases to pro bono attorneys
March	Referred 10 cases to pro bono attorneys
April	Referred 26 cases to pro bono attorneys
May	Referred 18 cases to pro bono attorneys Annual Meeting and Volunteer Appreciation Banquet
June	Referred 22 cases to pro bono attorneys
July	Referred 18 cases to pro bono attorneys
August	Referred 12 cases to pro bono attorneys
September	Referred 28 cases to pro bono attorneys
October	Referred 34 cases to pro bono attorneys Lawyer Referral Director, John Pushor, received a Randall T. Shepherd Pro Bono Publico Award, an article appeared in the Columbus newspaper
November	Referred 21 cases to pro bono attorneys
December	Referred 8 cases to pro bono attorneys

The District 11 Committee did not meet in 2004. The Plan Administrator, C. Robert Moats, and the Honorable Judge William E. Vance developed the plan for 2004. The current Plan Administrator, Tammara Sparks, met with Judge Vance in June of 2005 and discussed with him the necessity to assess and rejuvenate the committee. Judge Vance agreed and has put Ms. Sparks in charge of:

- contacting all current members to determine their willingness to continue to serve
- contacting the bar presidents in each county to see if they would agree to serve
- contacting a past or current recipient of services to see if they would serve
- scheduling a meeting of the committee within the next three months.

**Please provide a short summary of how the provision of pro bono service is coordinated in your district, including the intake process, the relationships of pro bono providers in the district, how referrals are made, and how reporting is done.**

There are two civil legal service providers in District 11, Bartholomew Area Legal Aid, Inc. (Legal Aid) and Legal Services of Indiana, Bloomington office (BLSO). Legal Aid is the only provider of pro bono services and is the only one to receive IOLTA funds. Both Legal Aid and BLSO provide intake for District 11 and both have toll free intake numbers. When BLSO has a District 11 case that needs a pro bono referral, Myrta Hudson, Paralegal/Office Manager calls and advises Legal Aid that they have a case for referral. She then faxes us the applicant's information. If Legal Aid needs more information prior to making the referral, Legal Aid contacts the client directly. Because Legal Aid and BLSO offer direct representation by staff attorneys for certain types of cases and because Legal Aid offers pro se assistance, referrals to pro bono attorneys are only made if there is no other way to resolve the applicant's legal problem.

Referrals are made by Legal Aid's Lawyer Referral Program Director, John Pushor. John makes referrals by calling attorneys that have agreed to participate. John speaks directly to the attorney or a member of his or her staff and describes the case to be referred. If the attorney agrees to accept the case, all relevant documentation collected by Legal Aid is faxed or mailed to the attorney, a letter is mailed to the applicant notifying them of the referral, and a referral file is generated at Legal Aid. In the letter sent to the applicant, it notifies them that they must contact the referral attorney within two weeks to schedule an appointment. Therefore, all referrals are tickled for two weeks to check on their status. If the client has not contacted the attorney, Legal Aid makes every effort to contact the client to find out why they failed to contact the referral attorney and to attempt to connect the two. Once the client has contacted the referral attorney, the client's file is then tickled for quarterly reviews to check the status of the case.

Once a case is completed, the pro bono attorney is asked to submit a closing form. The information contained in the closing form, i.e. time spent, expenses, donated fee, outcome, etc. is used to close the file at Legal Aid. If the attorney fails to complete a closing form, Sandy Wilson, Program Assistant, calls the referral attorney's office for closing details. Sandy will continue to call weekly until she gets the closing information. All of the client's information is collected using Kemp's Caseworks software – Clients 2000. A paper file for each referral is also maintained.

**Please describe any special circumstances, including difficulties encountered, affecting your District's 2004 implementation of its plan.** District 11's 2005 Plan targeted three main goals:

1. Getting more of the attorneys that are on the pro bono panel to *actually* take cases. Thereby reducing the amount of referrals made to the attorneys who do actually take cases. Legal Aid has not been successful. There are 141 lawyers who have agreed to be on our pro bono panel and only 84 were active in 2004. As of June 24, 2005, only 52 lawyers have taken a case but we have referred 107 cases. This means that some of those attorneys have taken more than two cases in the first six months of 2005. *This goal continues to be a priority for Legal Aid as is mentioned in the 2006 Plan.*
2. Hosting volunteer appreciation banquets in each county. Legal Aid is operating on a deficit budget and it is not financially feasible for us to meet this goal.
3. Dealing with the increase in two specific types of applications - applications for custody modifications that were needed due to the custodial parent using and/or selling methamphetamine, and applications from father's of children born out of wedlock to establish custody and visitation. In order to more efficiently and effectively assist these applicants, Legal Aid has increased the use of pro se filings. Then, based on the particular facts and circumstances of the case, a decision is made as to whether the applicant will be referred to an attorney for their court appearance or whether they will proceed pro se.

# BUDGETS FOR 2004, 2005 AND 2006 FOR IOLTA FUNDS ONLY

Cost Category	2004 Actual Expenditures	2004 Budget	2005 Actual Expenditures as of 6/1/05	2005 Budget	2006 Budget
<b>A. PERSONNEL COSTS</b>					
1. Plan Administrator	12,978	7,525	3,023	5,028	8,332
2. Paralegals	6,392	3,706	1,592	2,681	5,152
3. Others-Lawyer Referral Program Asst.	3,650	2,117	920	1,531	8,549
4. Employee benefits					
a. Insurance	1,864	1,081	673	938	0
b. Retirement plans	0	0	0	0	0
c. Other-Payroll taxes	0	0	531	888	0
5. Total Personnel Costs	24,884	14,429	6,739	11,066	22,033
<b>B. NON-PERSONNEL COSTS</b>					
1. Occupancy	1,125	652	320	506	1,020
2. Equipment rental	0	0	0	0	0
3. Office supplies	130	75	85	94	300
4. Telephone	1,000	580	378	543	840
5. Travel	638	370	11	434	200
6. Training	0	0	0	0	1000
7. Library	0	0	0	0	0
8. Malpractice Insurance	250	145	150	90	150
9. Dues and fees	0	0	0	0	0
10. Audit	463	269	0	0	0
11. Contingent reserve	0	0	0	0	0
12. Litigation reserve	0	0	0	0	0
13. Marketing and promotion	0	0	0	0	0
14. Attorney recognition	1,000	580	1182	543	1200
15. Litigation Expenses (includes expert fees)	1,000	580	2416	724	7500
16. Property Acquisition	0	0	0	0	0
17. Contract Services	0	0	0	0	0
18. Grants to other pro bono providers	0	0	0	0	0
19. Other-Postage	0	0	0	0	240
20. Total Non-Personnel Costs	5,606	3,251	4,542	2,934	12,450
<b>C. TOTAL EXPENDITURES</b>	30,490	17,680	11,281	14,000	34,483

IOLTA funds received **2004:** \$17,680

IOLTA funds received **2005:** \$14,000

## **Budget Narrative**

**Please provide descriptions of the following line items in the foregoing budget chart, by item number, in the space provided.**

**Lines (A)(1), (2), (3) Please indicate the number of hours per week for each personnel position and rate of pay.**

Line (A)(1) – The Plan Administrator currently works 35 hours per week at a salary of \$35,500 per year. She is also the Executive Director of Bartholomew Area Legal Aid, Inc. In 2006, if revenue permits, she will become full-time and her salary will increase to \$41,662 year. The amount budgeted represents 20% of her total salary in 2005 and 2006.

Line (A)(2) – The Paralegal works 40 hours per week at \$12.06 per hour. In 2006, if revenue permits, her hourly rate will increase to \$12.39 per hour. The amount budgeted represents 15% of her wages in 2005 and 20% of her wages in 2006.

Line (A)(3) – The Lawyer Referral Program Assistance works 30 hours per week at \$8.00 per hour. In 2006, if revenue permits, she will become full-time and her hourly rate will increase to \$8.22 per hour. The amount budgeted represents 17% of her wages in 2005 and 50% of her wages in 2006.

**Line (B)(1) Please describe the occupancy cost in terms of square footage, utilities or other amenities and indicate whether the occupancy cost is above or below the market rate for that space.**

Legal Aid pays \$400 per month rent for 1,704 square feet. All utilities are included. This is approximately twenty-four cents per square foot per month. This cost is well below the market rate.

<b>ANNUAL TIMETABLE FOR SUBMISSION OF FORMS AND CHECKS:</b>
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January 1:	Checks distributed
July 1:	Annual report, plan and grant application due to IPBC
November:	Notification of awards
<b>December 1:</b>	<b>IBF grant agreement due and revised budget due</b>